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EDI 940 - Warehouse Shipping Order

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Overview

The EDI 940 Warehouse Shipping Order transaction is used to instruct remote warehouses to ship sales orders. It is commonly used by a seller, such as a manufacturer or wholesaler, to authorize a warehouse to ship to a buyer, such as a retailer. The 940 may also be used to confirm a shipment, modify a shipment, or cancel a previous shipping order. The 940 transaction instructs the warehouse on what to ship, how much, and when.

Prerequisites

Before continuing with the EDI 940 configuration, make sure EDI is properly configured in SalesPad by reviewing the following documentation:

- EDI Installation
- EDI Processing
- Data Cross Reference
- <u>Business Object Mapping</u>
- EDI Server Connection Setup
- EDI Trading Partner Setup Steps

Data Cross Reference

Select the EDI tab on the ribbon and open the Data Cross Reference screen.

Data Cross Reference	×	
👕 Close 🛛 🍣 Refresh	🛃 Save	
Partners:		
🕂 New 🝷 📄 Copy	💢 Delete 🛛 🕞 Export	t Selected 🛭 🄄 Import 📧 Import Into Selected
Trading Partner ID	Partnership	EDI
8 B C	R B C	RBC 940
000ALLCERT	Warehouse	940 Warehouse Shipping Order

Click the New button to add a new trading partner and set the following columns:

Column	Value
Trading Partner ID	Trading partner ID from the EDI order header, such as 000ALLCERT
Partnership	"Warehouse"
Customer Num	GP customer number (optional)
Warehouse	Sales document warehouse/location (optional)
EDI	940 Warehouse Shipping Order

Make sure the new trading partner is selected and then fill out the following mapping tabs as needed:

- Addresses
- Items
- Units of measures
- Currencies
- Payment terms
- Shipping methods

Save all changes and close the Data Cross Reference screen.

Business Object Mapping Select the EDI tab on the ribbon and open the Business Object Mapping screen.

-New	🕤 Copy 💢	Delete 🛛 🕞 Exp	oort Selected 🛭 🄄 In	nport 🛛 🍓 Update All Mappin	gs
, Mapping Nam	ne ^Ÿ	Provider	EDI	EDI Description	
∎c 940		RBC	RBC	RBC	
940		SPS Commerce	940	Warehouse Shipping Or	der

Click the New button to add a new transaction and set the following columns:

Column	Value
Mapping Name	Name of the 940 transaction mapping
Provider	SPS Commerce
EDI	940
Schema Name	StockTransferOrders
Direction	Out
Document Type	Sales Document
Document Subtype	Sales document type and ID in Dynamics GP, e.g. "ORDER WMSORDER"
Trading Partners	Trading partners to which the mapping applies (trading partners are configured on the Data Cross Reference screen)

Save all changes and close the Business Object Mapping screen.

Security Editor

Open the Security Editor by going to Modules -> System -> Security Editor and make sure the Sales Document EDI 940 and Sales Document EDI 940 By Warehouse plugins are enabled. Update sub-securities as needed. Save all changes, log out, and log back in for changes to take effect.



Review Batch - When forwarding through workflow, sales documents will be sent to this batch if the EDI transaction fails.

Sales Document Entry

Sales Document EDI 940

Open the sales document and select the EDI 940 - Warehouse Shipping Order plugin from the Actions menu to process an EDI 940 transaction.

(ORDER) OF	RD1012 ×				
Close	🚽 Save 🛛 🔒 Print		🥵 Fulfillment 🛛 🚡 Run Script 🛛 📲 Split Sales Document		
Document Properties			Configure Actions		
Document #: ORD1012		۵	Update MO		
Customer #:	000011	-	Add Customer Default Items		
Cust PO:		_	Add Item		
Reg Ship:	11/16/2023	÷	Add Rental Item (Beta)		
Ship Method:	UPS GROUND	-	Aggregate Pricing		
Whse:	WAREHOUSE	D	Attach Sales Line to Manufacturing Order		
Currency:	Z-US\$	Ð	Attach Sales Line to PO		
		.	Auto Item Conversion		
		æ	EDI 940 - Warehouse Shipping Order		
		ø	Avatax Commit Tax		
		4	Back		
Line Items N	otes Addresses Ho	G	Blanket Order Invoicing		
🖪 New 🧝	Delete 📑 Insert	ß	Blanket Order Release		

The EDI 940 - Warehouse Shipping Order window will open, allowing review of the EDI 940 transaction details before generating and sending the EDI document.

💓 EDI 940 - Warehouse	Shipping Order			c	- 0	23	
Properties:							
Sales Doc Num:	ORD 10 12						
Customer PO Num:							
Shipping Method:	UPS GROUND	PS GROUND					
Delivery Date:	11/16/2023				~		
Ship To Address Code:	SHIPPING						
940 Destination:	000ALLCERT				-		
Items:	Number Item Description	Quantity	Qty Backordered	Unit Of Measure	Unit Price	2	
16,384 A100	Audio System	10	0	Each	39.95	5	
				Send	Cancel		

Select the 940 Destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.

Processing Warehouse Shipping Order	23
Warehouse Shipping Order Processed Successfully.	
	ОК

Sales Document EDI 940 By Warehouse

Open the sales document and select the EDI 940 - Warehouse Shipping Order (By Warehouse) plugin from the Actions menu to process an EDI 940 transaction.

(ORDER) ORD 1012 ×			
📑 Close 🛛 🗦 Save 🛛 🍃 Print		🛛 🥵 Fulfillment 🛛 🚡 Run Script 🛛 📲 Split Sales Docume	nt
Document Properties		Mark Packages As Historical	
Document #: ORD1012	₽⊧	PayFabric Authorize	
Customer #: 000011	₽⊧	PayFabric Capture	
Cust PO:	P;=	PayFabric Charge	
Reg Ship: 11/16/2023 Ship Method: UPS GROUND	LEC.	Payment	
Ship Method: UPS GROUND Whse: WAREHOUSE		EDI 855 - Order Acknowledgement	
Currency: Z-US\$	2	Print Labels	
	•	Purchase Order Generation	
		Receivables Scheduled Payments (Beta)	
	2	EDI 940 - Warehouse Shipping Order (By Warehouse)	
	۲	Retrieve PayLink	
	G	Sales Document Convert To BOM	
Line Items Notes Addresses Ho	92	Sales Document Get Tax	Re
🙀 New 🙀 Delete 📑 Insert	-8	Sales Document Manual Split	

A prompt may display that no partners have been set up for the partnership type. If so, open the EDI Data Cross Reference screen and make sure the Warehouse column is set for the trading partner. Save all changes and run the plugin again.

SalesPad	23
No partners have been set up for this partnership type. Please create a Warehouse partner in the EDI Cross Reference screen to use this feature.	
OK	

The EDI 940 - Warehouse Shipping Order window will open allowing review of the EDI 940 transaction details before generating and sending the EDI document.

Select the 940 destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.

Sales Document Workflow

The EDI 940 - Warehouse Shipping Order and EDI 940 - Warehouse Shipping Order (By Warehouse) plugins can be configured to run automatically in sales document workflow. They should be attached as the Plugin for whichever queue should trigger sending the EDI document. For example, in the below screenshot, the EDI 940 - Warehouse Shipping Order plugin will run when a sales order is forwarded out of the NEW ORDER queue, and the EDI 940 - Warehouse Shipping Order (By Warehouse) plugin will run when a sales order is forwarded out of the STAGING queue.

Workflow Queues							
📆 New Queue 🛛 Elected Queues 🤹 Resequence Queues							
Seq 🔺	Queue	Button Caption	Print?	Plugin			
10	NEW ORDER	Release		Sales Document EDI 940			
20	STAGING	Release		Sales Document EDI 940 By Warehouse			
30	PACKING	Release					

Note: The EDI 940 - Warehouse Shipping Order window will not be displayed when processing the EDI 940 transaction via workflow, but the transaction will be audited to the sales document audit log.